Knowledge Base Article

Product Group: Software Product: CMSW7200, CMSW7300, CMSW7400 - @ptitude Analyst Version: All

Abstract

This article describes how to set up SKF @ptitude Analyst to allow the automatic creation of reports on network drives.

Overview

SKF @ptitude Analyst (including @ptitude Inspector and @ptitude Analyst for the Microlog Analyzer) has the ability to schedule reports to be automatically generated at specific times.

When assigned to the SKF @ptitude Analyst Transaction Service, this functionality can be run without any @ptitude Analyst clients being logged in.

The report generation functionality has the ability to store these reports on network drives, but only if the network drives have been set up beforehand as logical drives.

The following is a step-by-step process of how to configure the software to automatically generate reports to a network drive.

PROCEDURE

- Set up the network directory (IT) The first step is to have a network drive and directory identified. This is typically done through a request to the company's IT department. The network directory must be visible to the computer running the Transaction Service, and the account used to run the Transaction Service must have "write" access to that drive. This is critical for the functionality to work.
- Set up a Logical Drive on the @ptitude Transaction Service computer (IT)
 Once the drive has been identified and verified as being able to be written to by the computer and account where Transaction Service is running, then the drive needs to be set up as a "Logical Drive". One way to do this is via the NET USE command of Windows.

For example, if one wanted to assign the Logical Drive R: to the directory <u>\\NETWORK_COMPUTER\Common_Report_Directory</u>, the command:







NET USE R: \\N_C\C_R_D /USER:U_A password

would be used where:

- N_C = The name of the Network Computer
- C_R_D = The name of the Common Report Directory and
- U_A = The user account used to connect to the network computer.
- Password for logging in
 - Please consult your current operating system manual for complete details of the NET USE command.

This command needs to be run every time the computer running the Transaction Service starts up. This can be done with a script or batch command.

In addition, when configuring reports in @ptitude Analyst, the @ptitude Analyst client must have the exact same Logical Drive setup as the one intended to be used by the Transaction Service.

 Set up the @ptitude Analyst report to be generated (@ptitude Analyst ADMIN) Reports are created using the File > Reports... function. When adding a new report (or editing an existing report), the Report Editor dialog has an "Assign" tab. The network drive should be assigned using the Browse button. [Figure 1]

eport Editor		Station, 4	
General Definition	Assign		
Default report cor	figuration		100
Report location:	R:\		Browse
<u>D</u> ata source:			



NOTE: During the configuration of the report, the exact same Logical Drive needs to be set up on the computer running @ptitude Analyst as the computer running the Transaction Service.

 Create the scheduled event (@ptitude Analyst ADMIN) Scheduled events are created through the Customize > Scheduler... function. New events can be created using the Add... button. [Figure 2]



4 N. NY W		the second se	Sec.
Current scheduled eve	nts:-		
When event occurs	1	Perform this action	User

Figure 2. Add button in Scheduler dialog

This will launch the "Event Scheduler" wizard. The second page of the wizard allows for the selection of the event type. For example, if a report is desired to be created weekly, the first thing Monday morning, then the event type selected would be "At specified time". [Figure 3]

elect the event that will o outton, if enabled, to confi	cause an action to be performed. Unck the Settir figure the selected event's parameters.
Select an <u>e</u> vent:	
Alarm condition Analyst startup	
MARLIN/Microlog Inspec Microlog Analyzer upload his event is used to sche ne "Settings" button to sp	ctor upload complete I complete edule a task to be performed at a specific time. Cl pecify the event time.
	Settings

Figure 3. Event Scheduler configuration dialog



Once this event is selected, the parameters of the schedule can be set using the Settings... button. [Figure 4]

<u>S</u> tart date:	3/24/2014 🔻		
S <u>t</u> art time:	6:00:00 AM		
- Schedule			
⊂ <u>H</u> ourty	Every 1	 Week(s)	
C Daily	Monday	E Friday	
Weekly	Tuesday	Saturday	
C Monthly	Wednesday	E Sunday	
C Yearly	□ □ □ Thursday		

Figure 4. Time Event Settings configuration dialog

The event action can be selected from the next page. In this example, the action would be "Generate Report". [Figure 5]

button, if enabled, to con	figure the action's param	t occurs. Click the leters.	e "Settings"
Select an <u>a</u> ction:			
Display a message			
Send message			
The generate report action event occurs. Click the	on will create the specifie "Settings" button to conf	ed report when the igure the report pa	associated rameters.
The generate report active vent occurs. Click the	on will create the specifie "Settings" button to conf	ed report when the igure the report pa	associated rameters.

Figure 5. Selecting 'Generate report' as the action

Once this action is selected, the parameters of the report can be set using the Settings... button. [Figure 6]



Description:		
<u>R</u> eport:	_KBA_TEST	•
Data <u>s</u> ource:		
Last Uploa ⊕ Microlog In	ad hspector Profiles	
Destinati <u>o</u> n:	HTML	



Figure 6. Generate Report settings

The report definition (along with the assigned logical network drive) is chosen, as well as the destination. When the report is run, it will appear on the network drive. If "Email" is selected as the destination, the recipients must be defined below it in the Send to field.

The final dialog allows the definition of who 'owns' this scheduled event. To allow the report to be automatically generated without the need for a @ptitude Analyst client to be running, the event can be delegated to the Transaction Server by checking the appropriate box. [Figure 7]

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Select the user delegate the ev and not requiring	to whom this ev ent to Transacti g log on.	ent will be assign on Server in orde	ed. You can cho r to run it in the b	ose to ackground
Select <u>u</u> sers:	Γ			*
Delegate to	Transaction Se	ver		
The time event	will run on Trans	action Server's lo	ocal time zone.	
The report will b not set to a netw Server can write	e stored by Trar vork address. If e to it.	it is a network a	cally if the report Idress, verify that	location is Transaction
If the report loca network address	ation is a network s.	k drive, it must be	changed to an a	absolute
Transaction Ser destination to O	ver only support pen Window or	s repor <mark>t d</mark> estinatio Printer will be ign	on to HTML. Rep ored.	port



Figure 7. Event delegated to Transaction Server

Remember, the following conditions must be met:

- If the report location is set to a network address, verify that Transaction Server can write to it, as stated in step 1.
- If the report location is a network drive, it must be changed to the Logical Drive created in step 2.

For further assistance, please contact the Technical Support Group by phone at 1-800-523-7514 option 8, or by e-mail at <u>TSG-CMC@skf.com</u>.